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ABSTRACT

A compelling case statement--the stated rationale for the existence of an institution as well as for its growth and strengthening--is one of the most important tools for the success of a major development program. This document defines the components and uses of a case statement, discusses its elements in detail, and provides guidelines for case statement preparation. The discussion is illustrated by four appendixes. The first provides a brief case statement outline, including (1) a summary of the school's purpose, (2) a plan to accomplish the goals, and (3) a plan for involving people and raising dollars and volunteers. The second appendix provides a detailed case statement outline, including (1) institutional mission, (2) record of accomplishment, (3) directions for the future, (4) priorities and costs, (5) plan of action, and (6) sponsorship. The third appendix provides a checklist of institutional data, while the fourth is a sample case statement from the John Burroughs School (St. Louis, Missouri) for expansion of its sports and performing arts center. (TE)

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The Case Statement

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EA 017 357

The Case Statement

by Dr. Robert J. Yeager

National Catholic Educational Association
Office of Development

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About the Author

Robert J. Yeager is currently Vice President for Development of the National Catholic Educational Association. His multifaceted position calls on him to conduct development efforts for the Association, and also to direct a national training symposium in development issues for members from local institutions and parishes.

He was previously Executive Director of the Secondary School Department/NCEA after completing high school principalships for 15 years in the Diocese of Toledo.

Dr. Yeager is the author of *Pastors Development Newsletter,* an NCEA project to inform and encourage American pastors to use development techniques. The newsletter, published four times a year, is sponsored by the Fr. Michael J. McGivney Fund for New Initiatives in Catholic Education. He also directs the annual NCEA development symposium held in conjunction with the NCEA convention.

Foreword

While all professional writers on development acknowledge the pivotal position of the Case Statement in a total development effort, many practitioners race ahead to what they and their constituents see as more "fertile ground" during the early months of a local development program. It is difficult to spend time laying a detailed and firm foundation when many colleagues are crying for an immediate solution to some pressing financial problem. However, no cathedral has stood for very long without firm piles for support. I fully encourage development directors to work and rework the Case Statement according to the directions laid out in this book.

Much of the material presented in this book has been supplied to the NCEA Office of Development by Dr. Robert L. Stuhr of Gonser Gerber Tinker Stuhr of Chicago, IL. Dr. Stuhr's continuing interest in and support of American Catholic educational institutions is commendable. His ideas and suggestions have stood the test of time. They are successful, provided they are applied in local situations.

Richard J. Burke continues to offer assistance to the Catholic community especially in the area of financial planning. He has also contributed to the material presented in this book. Mr. Donald J. Whelan, Director of Development, John Burroughs School, St. Louis, MO, graciously gave permission to reproduce the Case Statement in Appendix D which is offered as an example.

Readers' suggestions and comments are always welcome. The NCEA development program is a service to members—it can be a success only with continual evaluation and encouragement from those members.

Rev. Robert J. Yeager
Vice President/Development
September 1, 1984

The Case Statement

Dr. Robert J. Yeager

Case Statement: What it is

A compelling Case Statement is one of the most important tools for the success of a major development program. An effective Case Statement is more than a brochure for prospective donors. It is the rationale for the very existence of the institution as well as for its growth and strengthening. It shows the institution's productivity and how it benefits society. It presents clearly the ways the school wants to improve its service to society and the resources required.

An effective development program depends on thorough and comprehensive communications with various constituents and publics to create awareness and understanding about an institution's mission and goals. The Case Statement is the foundation for all successful communication. It is a narrative developed by the school's key leaders, first for interior and ultimately for external use. The document serves as a basis for the preparation of communications materials to meet other needs, such as annual reports, promotional brochures, state of the school reports as well as general publicity. In a word, it states the institution's rationale for existence.

The Case Statement should consider the institution in terms of philosophy, mission, long-range plans, programs, effects on the broader community and resources necessary to achieve the goals. Under no circumstances should the Case Statement simply present needs. It should present primarily the school's opportunities for growth, expansion and involvement of people.

A Case Statement makes straightforward statements about the following:

- The institution's programs and objectives, what it must do to improve or change its activities and aims, and why the institution is valuable to society.
- The goals of the fund raising program to support the institution. What are the funds to be used for? How will the success of the program strengthen the institution? Why is the reaching of the goals vital to society and particularly to the special publics of the particular institution?
- Ways in which the institution will remain significantly productive in the next decade—both through the generosity of its supporters and its own efforts to operate more efficiently.

Definitions

In order to understand the conceptual placement of the Case Statement, a review of some of the main terms in development will be helpful.

- Mission
  The mission statement gives the central purpose of the institution. This statement, as well as others, needs to address the mission of *this* institution here and now in history. The mission statement is not some dogmatic statement about the whole church or even a whole diocese.
- Goals
  Goals are the major areas of concentration and the priorities which will be used to accomplish the stated mission.
- Objectives
  Objectives are specific activities, stated in some detail, whose accomplishment within a limited time frame will move toward the realization of the goals.
- Case Statement
  The Case Statement uses the mission, goals and objective statements. It is a document which shows the mission of the organization, the accomplishments of the past, what is needed in the future to realize its full service potential, and a specific plan of action which would contain specific projects and programs with goals directed to various publics.

All of this should make it quite clear that much communication must take place between all of those individuals and groups who are involved in each of the above four steps. Long term planning is a necessary prerequisite for any Case Statement.

Uses of the Case Statement

A Case Statement is used both within the institution, and after its finalization, as an external document. There are six main uses:

- Obtaining Consensus
  Internally, and particularly during the early phases of campaign planning, the Case Statement is valuable in obtaining a consensus about the school's priorities, the directions envisioned, the resources deemed most crucial, the avenues of services to be stressed and opened up, and the school's thrust in the educational world. In the early stages, the Case Statement goes through many drafts. At this point it must remain a purely internal document. Representatives of key groups in the institution read and revise. Through repeated versions, a general agreement develops concerning priorities, aims and financial goals.
- Recruiting Volunteer Leadership
  The Case Statement is useful in recruiting key volunteer leaders for a major development effort. This must be done early in the planning phase even before any brochures are printed. The Case Statement which shows specific reasons for the extent of and goals of the campaign helps answer questions of prospective campaign leaders, giving them confidence in the planning and direction.
- Informing Volunteer Workers
  The Case Statement can be used by professional staff and volunteer leaders to obtain volunteer workers. Much of what has been said in the preceeding paragraph on recruiting leadership applies here, except now the volunteer leader can use the Case Statement to assist him in the formation of a group of dedicated campaign workers.
- Obtaining Major Gifts
  Often in a major development effort a proposal for a major prospect is required even before brochures and

the printed materials are off the press. The Case Statement, even in draft form, is very effective with a personalized cover and a personalized approach keyed to the particular donor—as a tool in solicitation.

- Testing the Market
  The Case Statement can be used to determine how the potential major donors feel about the proposed campaign. It provides a vehicle to bring the prospective major donor into the planning process and react to the proposed objectives. Used at this point there is still sufficient time to make changes indicated by donor reaction before final materials are printed.
- Resource for Publications & Publicity
  Finally, the Case Statement, once consensus has been reached by the powers that be, is the basis for solicitation materials.

Elements of a Case Statement

The heart of the Case Statement is obviously the parts that make it up. Some are more critical than others. The critical ones are discussed here in detail. Outlines which can be followed in writing a Case Statement are presented as Appendices A and B.

- The Mission of the School
  The first section of a Case Statement should define the mission of the school. Donors today are mission oriented. They want to know why the institution was founded and what its role is in education today, especially in the educational enterprises available in the community in which it exists. The general philosophical question of why Catholic education should exist also needs to be addressed. Additional questions to be answered are: If this school did not now exist, would it be founded? What is its philosophy of education? What is distinctive about the institution—both as an educational enterprise and as it is Catholic? What is there in its heritage and present organization which must be preserved and strengthened?

  Goals and objectives which are presented in this section, should be presented not only from the school's perspective, but very clearly from the point of view of the broader community. The Case Statement should

consider the reader in terms of his/her relationship to the institution, the ways in which he benefits from the school, as well as his needs, concerns and aspirations.

- The School's Service, Achievement & Productivity
  Mission and purpose are important factors in obtaining support. A clear description of a school's programs and services will evidence the school's service. Does the school serve the church by building message, community and service? How has the school grown academically, in programs, in meeting the demonstrated needs of students, the community, and the church. What number and kind of alumni/ae has the school produced? How has the institution grown in physical facilities and plant? in endowment? in philanthropic support?

  Even more important, what are the measurable results of the institution's programs and services? Many business executives are asking pertinent questions about measurable achievements of philanthropic institutions—such as the comments of James F. Bere, chairman and chief executive officer of Borg-Warner Corporation:

  > "Philanthropy is not expected to show a profit, but it is supposed to have results. Inefficiency and unclear purpose can develop in both profit and non-profit sectors. But in business, we are held to account; if less money is available, we must cut costs and do things better. In the future, business will be asking for similar accountability from philanthropy . . . Frankly, the more we are asked for, the harder we must look at the requests. Grant seekers must go beyond simply asking in the name of a good cause . . . Philanthropic or business organization, we face the same rule: become more productive or be prepared to fade away."[1]

- New Directions
  This section will state how the school wishes to improve its services and realize its full potential. Some or all of the following questions should be addressed here:
  - What are the institution's long range plans?
  - What is the thrust the school wishes to embark on?

[1]Bulletin on Public Relations and Development for Independent Schools, Gonser Gerber Tinker Stuhr, Chicago, IL, December 1981.

- What are the educational objectives, new programs, changes in curricula which will enable it to fulfill its mission in today's world?
- What facilities must be improved or obtained?
- What financial support is required?

In summary, what does the school wish to do, that it is not now doing? These questions should be answered making constant reference to the school's long range plan. Review should also be made of the impact these plans will have on the local church and civil communities.

- New Resources Required

What will it take in new resources to make possible the school's new thrust or continued programs? What new construction must be provided? What renovation and remodeling is required? What equipment is needed? Is endowment needed for general operations, for support of faculty salaries and opportunities for faculty development? For scholarships and financial aid? What is the level of current operational support required?

In addressing new resources, do not limit the consideration to purely monetary terms. Since people are at the core of all successful development efforts, and are particularly important to the mission of Catholic institutions, this section should present the needed resources in terms of volunteers, faculty, staff, parents, and other key individuals.

- The Plan for New Resources

The development program is the plan to obtain new resources. This portion of the Case Statement should describe the major comprehensive development program/its theme, goals and length of duration. Questions to be answered include:

- What are the goals for expansion and/or improvement of the physical plant, for equipment, endowment, current operations, and estate planning?
- What is the organization, leadership and timetable for development?
- What publics will be contacted, when, and what goals for each?
- What is the range of goals needed?

- Are there opportunities in the plan for memorial gifts and if so what are the price tags?
- What are the ways in which gifts can be made—such as cash, pledges, estate planning, etc?

- Meaning of a Successful Campaign
  A very clear statement needs to be made about what the success of the proposed program will mean to the institution. Emphasize again what will be done with the funds sought. Various aspects of success will be enjoyed by the community, multiple constituencies of the school, and society in general. These aspects should be identified in this section. A word is in order here about the plan which will report the responsible use of the new funds as well as their custodial care until used. Being able to show that funds sought for a precise purpose will not be "co-mingled" with other general funds is a big incentive to the donor.
- Invitation to Participate
  The Case Statement should extend an invitation to the institution's various publics to participate in the school's future. This invitation should seek assistance of human resources as well as financial support. Concrete examples should be outlined especially for the giving of time and resources.
- Volunteer Leadership
  List the leaders of the development organization, members of the school board, alumni and parents boards, sponsoring parishes of a school together with other sponsoring or advisory groups. Make lists of as many volunteers as possible. If you offend in the making of volunteer lists, do so by making too long a list—do not omit anyone who is even remotely a part of the volunteer effort.

Case Statement Preparation

The process of creating the Case Statement is as important as the final document. The consensus reached through the various drafts of the Case Statement, revision after revision, incorporating ideas from many key groups such as school board members, administrators, faculty and staff, alumni and parents, will enable the program to have credibility, a clear

sense of direction, and a definite plan not so likely to be changed. A Case Statement provides direction and a means of institutional communication particularly in the important formative days of planning and setting goals.

Information Selection

Much of the information needed by the Case Statement writer can be gathered and constantly revised using some form of checklist. A sample of such a checklist is included as Appendix C. The checklist will contain more information than will be used in each Case Statement. The writer will soon develop a sense of what information should be selected for inclusion to strengthen a given Case Statement preparation.

Questions for Writer

Questions which the writer might consider while preparing the Case include:

- Why should individuals give to this school?
- Why should corporations give to this school?
- What will be the impact of the donor on the school and on the community at large?
- What will be the impact on the businesses which support the school?
- How many employees of an investing business are alumni or parents?
- What does the local community expect from the school?
- How well do we recognize and show appreciation to donors?
- How well do we publicize our school's programs and accomplishments?

Rules for Writer

A few brief rules in addition to the usual rules about good grammar and form can be helpful to the writer:

- Be direct and be brief, but be thorough.
- Write only statements which are supportable and defensible.

Stress the future, emphasizing the institution's value to society. Never build a case on simply perpetuating the institution.

Write for the donor and his point of view, not for your own.

Emphasize as many strengths as possible and build the whole document on them as foundations.

Be positive and optimistic without being unrealistic.

Be both rational and emotional.

The Document

The Case Statement should be of sufficient length to accomplish the task it sets out to perform. Probably about 8 to 15 pages is a good length, although the author has seen some which were effective at 40 pages. The length depends a lot on what Case is being made. Longer documents need a summary at the beginning which should not exceed 2 pages.

The format could well be in loose leaf or at least in some form that allows for annual updating. Covers should be of a heavier material than the text with a title and the name of the institution. The cover might have a simple school logo and a date also.

The writer must never assume that the reader knows about the institution and its importance. In practice the writer should plan to devote approximately 80% of the allotted time to listening, researching and thinking. Only 20% of total production time should be devoted to writing.

A special word about appendices. If documents are to be included in the appendix as suggested by appendix B page 13 be certain that they are reduced to a size which will both fit the paper size being used and still not be of such a small size that renders them illegible. Financial statements taken from ledger sheets as well as floor plans taken from blue prints often offend in this regard.

Appendix D presents an example of a completed Case Statement which incorporates many of the suggestions outlined in this booklet. Do not adopt the example to your own use by simply making small changes. Remember that the process of arriving at the final document is at least as important as the document itself.

Appendices

A
Appendix

Brief Case Statement Outline

A brief outline of a Case Statement which might be used in a Catholic school's early efforts has been suggested in the *Catholic School Management Letter*.[1]

I. A brief summary of school's purpose
   A. The role the school is playing in society and in education
   B. A brief history of the institution
   C. Some detail of the school's service and achievement within the community
   D. The ways in which the school contributes to the local community.
      1. Educationally
      2. Academically
      3. Economically
      4. Socially
      5. Culturally
   E. Names of specific groups served by the school
   F. The ways in which the school serves business, labor and civic communities
   G. Measurable results of the product
   H. Highlights of projects and programs
   I. Future plans for program improvement
   J. Investment opportunities detailed in terms of:
      1. Endowment
      2. Capital improvements
      3. Annual giving programs for student assistance, scholarships, teacher development, etc.

II. A plan to accomplish the goals

III. A plan for involving people and raising dollars and volunteers

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[1]Richard J. Burke, *Catholic School Management Letter*, Richard J. Burke & Associates, Hartford, CT, Volume 5, No. 2, September 1983.

B
Appendix

Detailed Case Statement Outline

A more detailed outline of a Case Statement which might be used by high schools and those with more extensive projects is suggested by Dr. Robert L. Stuhr of Gonser Gerber Tinker Stuhr.

Title

Table of Contents

Preface or Summary

This section should express the essence of the case in one or two pages and state overall goals.

I. Institutional Mission
   - A. Role in educational and society
   - B. Philosophy of education
   - C. Educational goals and program
   - D. Salient factors in its history—heritage and distinctions that have endured
   - E. Factors that appeal to publics such as:
     1. Students
     2. Parents
     3. Faculty and administrators
     4. Trustees and volunteers
     5. Friends and community
     6. Past donors
     7. Potential leadership and financial resources

II. The Record of Accomplishment
   - A. Academic and programmatic growth—regular and special programs
   - B. Students—meeting their needs
   - C. Faculty and administrators
     1. Nature and quality
     2. Role in teaching, research, policy
   - D. Alumni
     1. Further education
     2. Careers
     3. Civic leadership
   - E. Community service
   - F. Improvements in campus and physical facilities

G. Financial growth
   1. Annual operations
   2. Capital—current and endowment
   3. Methods used in finance accomplishments
H. Philanthropic support—distinctive gifts and bequests
I. Where the institution stands today

III. Directions for the Future
   A. Distinctions that must continue to endure
   B. New directions
   C. Educational objectives, curriculum, methods of teaching
   D. Students or Members or Clients
      1. Number to be served
      2. Nature of student body
      3. Qualifications
   E. Faculty and administrative requirements
   F. Governance requirements
   G. Financial policies for:
      1. Tuition and fees
      2. Investment management
      3. Business management
      4. Private gifts and grants
      5. Public support
   H. Physical facilities
      1. Campus
      2. Buildings
      3. Equipment

IV. Priorities and costs
   A. Priorities and costs
      1. Endowment for:
         a. Students
         b. Faculty
         c. Library
         d. Laboratories
         e. Operation of buildings
         f. Campus maintenance
         g. Programs/Projects

2. New buildings
3. Redevelopment of present facilities
4. Property acquisition
5. Debt reduction

B. Master plan

V. The Plan of Action to Accomplish Future Objectives

A. Goals

B. Programs

1. To support current operations
2. To support capital expansion
3. To support special programs or projects
4. Role of estate planning and deferred giving

C. Organization

D. Timing

E. Resources

1. Constituent sources
2. Range of gifts needed
3. Opportunities for memorials and tributes
4. Methods of giving

VI. The Institution's Sponsorship

A. Membership of the Board of Trustees

B. Membership of the development groups

C. Church/government

VII. Appendices

A. Financial Statement

B. Gift Opportunities

C. Floor Plans

D. Testimonial Letters

C

Appendix

Checklist of Institutional Data

I. Historical
   A. Brief history of institution
   B. Salient points of history of community
   C. Names of significant founders or benefactors of the institution

II. Accreditation

III. Curriculum
   A. Purpose of institution; how curriculum relates to that purpose
   B. Special programs
   C. Unusual teaching methods, new departures, etc.
   D. Informal educational programs, community services, etc.

IV. Geographical
   A. Extent of primary service areas; characteristics (urban or rural; population trends, etc.)
   B. Proximity to, or joint programs with, other educational institutions or area resources, such as libraries, museums, symphonies, art centers, theatres, etc.

V. Alumni
   A. Number living; number holding diploma from institution and number of former students who attended one year or more; geographic distribution
   B. Profile of alumni body by occupation
      1. percent in industrial and business management
      2. percent in health professions
      3. percent in law
      4. percent in full time service to the church
      5. percent in government or civic service
      6. percent in teaching
      7. percent in science other than teaching of health professions
      8. percent in the performing arts
      9. percent homemakers
   C. Names of some outstanding graduates in selected professional field and their titles; ratio of number

listed in *Who's Who in America* compared with enrollment; other indices of "productivity"

D. Percent entering college, graduate or professional schools
E. Honors received
F. For a proposal to a corporation, the number of alumni engaged in the same business as that of the corporation

VI. Faculty

A. Number full time; number part time
B. Number holding doctorate degree
C. Honors received
D. Special interests of individual faculty members within a general subject area
E. Books or articles accepted for publication, or works performed or exhibited

VII. Students

A. Enrollment this year, geographical areas represented; enrollment trends
B. Profile of the freshman class: by geography, by evidences of scholastic ability, by men vs. women, by honor received
C. Enrollment by denomination
D. Percent student body receiving some form of financial aid
E. Percent of freshman class who graduate as seniors
F. Number of student registrations

VIII. Physical Plant Resources

A. Valuation of plant and land
B. Buildings of note and names of principal donors
C. Special purpose laboratories of note and names of principal donors
E. Library facilities:
   1. Book capacity, present number of books, net additions yearly
   2. Ratio of seats to enrollment
   3. Number of variety of periodicals received
   4. Special collections of note
   5. Significant endowed book funds and names of donors

IX. Financial

A. Annual budget, dollar total
   1. Percent derived from tuition, from endowment income, from gifts, from operation of auxiliary enterprises, from other sources
   2. Percent allocated to instruction, to scholarships and other financial aid, to administration, to operation of auxiliaries, to other expenses

B. Comparison of tuition charge with cost of education per student; "hidden" scholarship

C. Percent of alumni contribution last five years to annual fund:
   1. Of total on rolls
   2. Of number solicited

D. Percent of parents contributing last five years to annual fund—Total

E. Recognition of institution by grants from national foundations or corporations

F. Valuation of endowment

X. Management

A. Biographical data about Principal and other principal administrative officers

B. Information about members of Advisory Board

C. Organization of the Advisory Board by committees

D. Proportion of gifts for annual budget which normally comes from trustees

XI. Evidence of Long-Range Planning

A. Published goals for the future

B. Progress toward those goals

C. How project for which funds are requested will advance the institution toward the achievement of these goals.

NOTE: Development officers should keep this checklist current and available for many uses including case statements and proposal preparation.

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D

Appendix

A Sample Case Statement

JOHN BURROUGHS SCHOOL

Sports and Performing Arts Center Expansion

A Legacy For The Future

In order to complete its master plan for the future, John Burroughs School is seeking $3,900,000—$3,550,000 for construction on an all-purpose Sports and Performing Arts Center, and $350,000 in additional endowment.

The difference between America's preoccupation with the loss of confidence in education and John Burroughs School's plan for the future is the result of long-range planning. Our strength lies in anticipating the educational needs in the years ahead.

The school's stated philosophy and objectives serve as a guide for change, a blueprint for excellence in education (see appendices). The school is dedicated to the concept of a coeducational day school, Grades 7 through 12, to prepare students for continuing education and for a useful community life by offering a liberal arts education with a balanced emphasis on academics, arts, activities and athletics.

For the past twenty years planning has given priority to faculty salaries, academics, and fine arts. The incomplete part of our plan is the inadequacy of facilities for winter athletics and for the performing arts (drama, dance, music).

Since 1947, when the Memorial Gymnasium was built, student enrollment has jumped sixty-five percent, to 550 from 334, and the space for academics has been increased 122 percent. However, no additional space has been added to indoor athletic facilities.

John Burroughs School stands today at a decisive intersection. To continue its present course, the school faces the prospect of losing qualified candidates and of changing the nature of its athletic program. However, a "right" turn would put John Burroughs back on the route to strengthening its reputation as one of the outstanding independent day schools in the nation.

Why is there a critical need for a multipurpose facility?

1. The school thus far has compensated for the lack of indoor space by adjusting schedules and renting alternate facilities, but the penalty on students is becoming too great. The school has been forced to send its athletes for swimming, basketball, soccer and racquetball to Community School, East Ladue High, Westminster Christian Academy, Villa Duchesne and St. Louis Country Day School, and to public facilities.
2. Increased interest among girls in competitive sports and physical education has caused another severe strain on present indoor play space.
3. The present buildings are obsolete. Missouri State High School Activities Association rules changes have placed an added burden on the present gyms. Only the Memorial Gymnasium is large enough for a regulation basketball court, and it must accommodate the five girls' and boys' basketball teams.
4. New physical education programs arising from national awareness for good health—physical conditioning, weight training, and aerobic exercises—and the emergence of new winter sports such as indoor soccer and racquetball compound the problem.
5. Encouragement of the performing arts as a national goal as well as a school objective has stimulated student participation in music, drama, and dance.
6. Evaluators from the Independent Schools Association of the Central States (ISACS) recommended in 1980 a multipurpose facility to fulfill the school's commitment to equal programs for boys and girls.
7. The commons area in the proposed building would ease the ISACS evaluator's concern over "unacademic" sounds resulting from student use of corridors as lounge areas in proximity to teaching classrooms.
8. Additional problems would be solved by the new building. Shower and locker room space is grossly inappropriate for the girls. Girls' exercise classes are held in the senior girls' locker room. Boys' wrestling is located in a converted storage room. The visitors' locker room was eliminated in favor of a weight training area. Dance is held in the basement of the Science Building and small drama productions are presented in the music practice

room. Instrumental music shares a room with three vocal groups. All these are makeshift facilities.

9. The new building would provide space for organized, parent-sponsored and supervised dances, parties or athletic activities in a healthy and convenient social atmosphere. Interest is building for more parent-supervised class activities using school-type facilities to occupy the students' weekend leisure time. These are the present hours in which boredom often sets in because of a lack of constructive things to do.

Evaluators' Comments

The Building and Grounds Committee of the Board of Trustees reaffirmed these physical needs back in 1978 and two years later the ISACS evaluation team recommended that the Trustees and school administration examine the athletic facilities in an effort to fulfill the equal-program commitment. The evaluators stated in their report: "The tremendous upsurge in recent years of girls' athletics has precipitated problems in the athletic department as it has in similar operations throughout the nation."

The ISACS evaluation report commented also on an enclosed swimming pool and additional play space as "a most critical need." It continued: "We understand that a multipurpose building is being contemplated. We endorse unanimously its construction. It is badly needed." Elsewhere in the report the committee expressed concern over the "unacademic sounds resulting from student use of corridors as commons areas in proximity to teaching classrooms." The result of not having a designated area to congregate indoors and away from classrooms interferes with instruction.

A study was made to determine the possibility of rescheduling the use of athletic facilities to relieve the congested afternoon hours. Two obstacles prevented a change: Morning hours are the best for teaching academic courses, and interscholastic sports contests have to be scheduled in the afternoons to accommodate the opposing schools—public and non-public.

Total Facility Review

Considering those facts, the Trustees appointed a Long Range Planning Committee and assigned it to make a feasibility study of the complete physical plant. In addition to the need for a multipurpose building, the committee examined

the possibilities of adding another athletic field and the facility needs of all school departments.

Several additional problem areas were identified in the course of the study. The theatre department outlined the necessity for a second, more intimate performance area for small presentations; the music department was found to be lacking in practice, storage and performance areas for band and orchestra, and basement space in the Science Building designated for modern dance was needed for additional classrooms.

It should be noted that in the past fifteen years attention had been given to areas of the school on a priority basis, taking care of the most critical need at a particular time; and 90,000 square feet of teaching area had been added without fanfare or capital campaigns.

Vision and planning by those in leadership positions and the generosity of past contributors are responsible for the school's success story. And so today, as John Burroughs looks to the year 2000 and beyond, a careful plan for the future has been developed.

Proposed Solution

Armed with a list of present requirements, the Board of Trustees engaged the architectural firm of Hastings & Chivetta to offer possible solutions. Through imaginative and creative designs, the architects not only addressed and solved all problem areas, but they accomplished this without too much disruption of existing facilities and athletic fields of the school.

Their proposal provides something essential for each of the four areas—academics, arts, activities, and athletics. It calls for the continued use of two of the three athletic buildings with moderate remodeling. The middle gymnasium, with the addition of a second floor, would provide flexibility for a variety of sports and performing arts events. A lower level would accommodate new locker rooms for the girls, and an upper level would serve as a performance area for theatre in the fall and spring, for wrestling and gymnastics in the winter. The Memorial Gymnasium would remain as the regulation area for boys' and girls' basketball, and the natatorium would be built on the site of the present 1923 (little) gymnasium. On the west side of the Memorial Gym, where there are three tennis courts, a new field house would be built. The entire complex then would be known as the Sports and Performing Arts Center.

The field house would contain four cross courts suitable for basketball, volleyball or tennis, and the entire area could be used for indoor winter soccer. Space also is designated for a running track and two racquetball courts. Because of its design, the field house could be used in inclement weather for outdoor sports as well as for any number of small-space activities such as fencing, badminton, martial arts and the like. The building would relieve much of the pressure on the school's presently limited athletic fields.

The field house and the middle gymnasium remodeling not only would provide for present needs and ensure greater space and activity equality for boys and girls, but their flexibility should accommodate future requirements as well. The large unobstructed space and performance areas would permit the school to adjust programs to future student needs and preferences. With adequate space for all of the many teams requiring indoor court areas, the school no longer would have to schedule practice sessions one after the other into the evening.

The pool would provide an on-campus site for competitive swimming and water polo and would allow a greater diversity of offerings in both the boys' and girls' programs with such things as recreational swimming, water safety and life saving instruction, and swimming for fitness.

The dance and instrumental music areas would provide, for the first time, separate locations designed to accommodate the particular requirements of each without accompanying music disrupting nearby classes. A permanent home for instructional music would eliminate a difficult scheduling problem for the present music room, where it is impossible to hold choral and instrumental classes simultaneously. The theater area would permit presentation of such innovations as theater-in-the-round and smaller programs not requiring a large auditorium, as well as providing rehearsal space.

In addition to serving the school, the entire complex would be used for adult programs at night and on weekends—swimming, physical fitness, running, tennis, etc. Income from these activities would help to offset the additional overhead costs of the new building.

The commons area would be an activity and study area for students during the day. At night it would be an imposing entrance way to the auditorium and to the Sports and Performing Arts Center, simplifying crowd control, particularly

at intermissions or halftimes. It is easy to visualize its use for any number of other activities and events such as class meetings, parent meetings, or receptions.

Between the main building and the natatorium, the present parking lot would be removed and the quadrangle expanded into that area, thereby improving campus appearance. The dirt removed from the construction site would be used to fill the bowl in front of the Headmaster's house for a small practice field and auxiliary parking. The present north parking lot would be rearranged to provide additional parking spaces.

Summary of Gains

In summary, the school would gain:

1. Equality of athletic opportunity for girls and boys.
2. A pool for year-round use by the school.
3. Adequate modern indoor athletic space for all present and anticipated needs.
4. Performing arts space to meet increased demand and to relieve present congested areas.
5. Relief for classroom teachers by providing a commons area for students.
6. Adequate and modern girls' locker room.
7. Valid solution to all the facility problems identified in the 1980 ISACS Evaluation Report.
8. Modernization of the school's athletic facilities to compare with the other modern campus buildings.
9. An athletic center with indoor pool for student and community use after school hours and on weekends.

Projected Cost

Cost estimates for the total project, including the Sports and Performing Arts Center, the grounds and parking improvements, amount to $3,550,000. Since most of the project involves the remodeling of existing facilities, the amount is only a fraction of what the same space would cost new. The increased economy of operation of the rehabilitated buildings and their rental income would offset a substantial part of the utility fees for the new facility.

Past Responses to Facility Needs

In order to understand the present, it is important to know that the school has conducted a long term self-evaluation process to meet its facility needs in a continuing way. The challenges of each decade have led to timely identification by the Board of Trustees and the administration and they have been met readily by the school's benefactors. Foremost

examples include the raising of $400,000 in funds for Haerter Hall in 1957, $335,000 for the Stamper Library in 1965, $350,000 for the Gaylord Science Building in 1965, and $605,000 for the Fine Arts Building in 1976.

By turning to the appendices and studying the detailed list of major plant expansion projects for the past thirty years, one may see how well John Burroughs has been able to keep pace with the ever-changing educational demands.

Past Responses to Financial Needs

When John Burroughs School's financial condition has been stable and sound for many years, the economy and legislation which are reshaping the course of all institutions are placing greater emphasis on the necessity for a growing Endowment Fund to protect faculty salaries. Through the generosity of the John Burroughs family in recent years, the Annual Giving Program and the Endowment Program have decreased the percentage of income which tuition and fees contribute to the operation of the school.

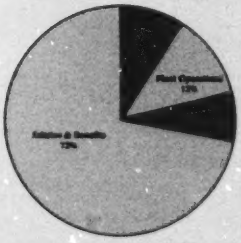
Percentages of Total Annual Income

Year	*Annual Giving*	*Endowment*	*Miscellaneous*	*Tuition / Fees*
1972-73	10%	3%	5%	82%
1977-78	11%	7%	6%	76%
1982-83	14%	10%	7%	69%

Because of its Endowment Fund, which currently has a market value of more than $7,000,000, it has been possible for the school to provide adequate compensation for its outstanding faculty with salary and benefits comparing favorably to other schools in the area. Seventy-two percent of the 1983-84 Expenditure Budget is for faculty and staff compensation.

1983-84 Budget

EXPENDITURES



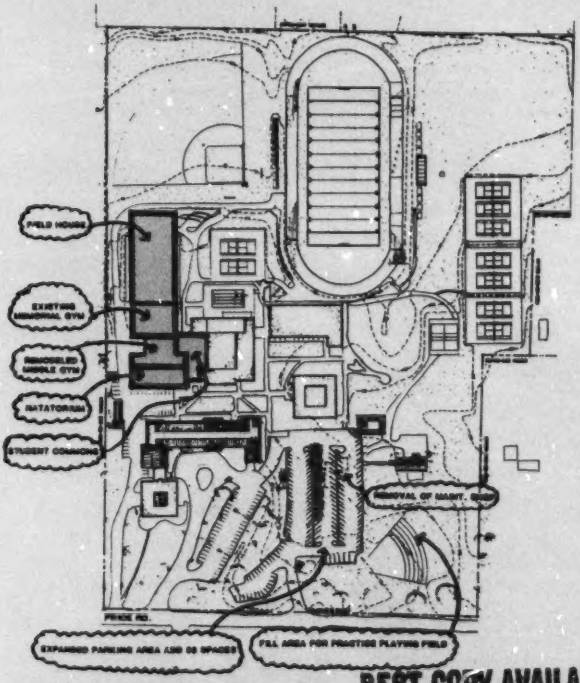
INCOME

The John Burroughs School Endowment Fund should increase by $350,000 over the next three years to maintain adequate endowment. The endowment need is modest and realistic to guarantee and continue the proper compensation for the school's outstanding faculty.

During the next three years the Annual Giving income must increase at an annual rate of approximately ten percent in order to maintain its proportion of total income:

	1983-84	*1984-85*	*1985-86*	*3-Year Total*
Annual Giving Gifts	**$518,000**	**$570,000**	**$627,000**	**$1,715,000**

Site Plan Indicating Development Area



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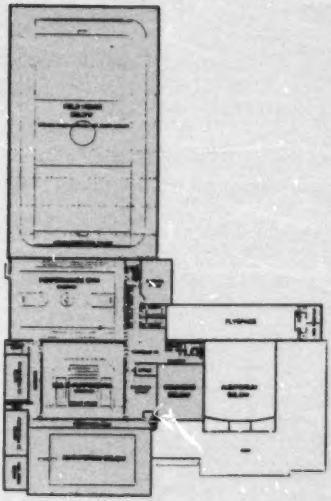
The Annual Giving income is an important part of the school's general operating fund and therefore must continue without abatement. Otherwise, John Burroughs School may become too expensive for many of the people it now serves and the school would lose its diversity of students.

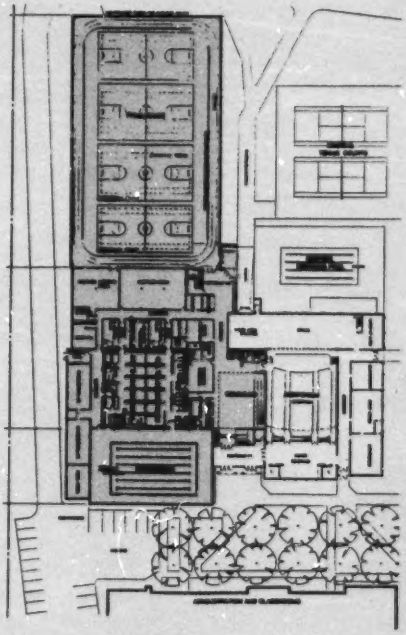
In Conclusion

The Board of Trustees has voted unanimously to accept the recommendation of the Long Range Planning Committee as outlined in this proposal and to support a capital campaign to provide the funds necessary for the construction of these facilities.

Successful completion of the fund raising by June, 1985, would permit the construction of this sports and performing arts center prior to the retirement of Edward W. Cissel as Headmaster. It would be a lasting tribute to mark this positive impact on JBS, for it was his vision and leadership which has brought us this challenge for the future of John Burroughs School.



UPPER LEVEL



LOWER LEVEL

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Responses to Prior School Needs

Need	*Plant Addition*	*Year*	*Replacement Cost-1983*
Language laboratory and Classrooms	Main Building renovation	1954	$ 160,000
Science and Drama	Haertter Hall	1957	$ 1,400,000
Outdoor athletics	Twelve tennis courts, all-weather track, football field, and field hockey area	1963	$ 550,000
Library	Stamper Library	1965	$ 950,000
Science	Gaylord Science Building	1966	$ 1,400,000
Science	Animal Room, Laboratory Classroom-Science Building	1968-73	$ 140,000
Summer Camp	Outdoor pool	1968	$ 50,000
Outdoor Education	Drey Land Camp in the Ozarks	1971	$ 60,000
Maintenance	Shop and Storage Building	1972	$ 65,000
Sculpture, painting, and music	Fine Arts Building	1976	$ 1,100,000
Administration, Classrooms, Study Hall	Main Building renovation	1976	$ 400,000
Energy Conservation	Main Building windows; Heat Controls throughout	1979-81	$ 250,000
Home Economics	Main Building renovation	1981	$ 35,000
Admissions Office	Haertter Hall renovation	1981	$ 35,000
Classroom lights and ceilings	Main Building renovation	1968-82	$ 50,000
Weight Training Room	Boys' Gymnasium renovation	1983	$ 25,000
Industrial Arts	Main Building renovation	1983	$ 40,000
			$ 6,710,000
ENDOWMENT FOR SALARIES AND SCHOLARSHIPS		1968-83	$ 7,200,000

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